



Objective: The Job Aid is a reference guide for the Volunteer Director/Manger's responsibilities in the My Turn Volunteer system. With screen shots and step-by-step instructions, this manual is meant to assist Volunteer Directors/Managers in operating successful clinics with volunteer support using the My Turn Volunteer system.

Curriculum Overview:



Volunteer Management Dashboard

- Welcome Email
- View Volunteer Management Dashboard
- Reporting



Clinic Management

- Access Skedulo to manage volunteer shifts
- Clone existing shifts/jobs from My Turn Volunteer portal
- Group Codes
- View clinic details
- Clinic Dashboards
- Assigning Volunteer Managers
- Approving Volunteer Managers



Volunteer Resource Management

- Volunteer Experience Overview
- Import CSV files with Volunteer data
- Edit and vet Volunteer records
- Visibility to Volunteer Training Submissions
- Mass Update Volunteers
- Send bulk emails to Volunteers



Preparation The Week Of The Clinic

- 72 hours before the clinic
- 48 hours before the clinic
- 24 hours before shift
- Day of the clinic



Need assistance? myturnvolunteer@californiavolunteers.ca.gov





What's new?

7/12/21 Release Updates:

This deployment includes the new features and enhancements to:

- Clone volunteer shifts for easier scheduling
- Import volunteer data into My Turn Volunteer through CSV files in order to quicken the volunteer's ease in registering for a shift.
- Ability to assign same individual as a VD for multiple clinics
- Add Volunteer Directors or Volunteer Managers with one click through the 'add users' feature

Previous Updates:

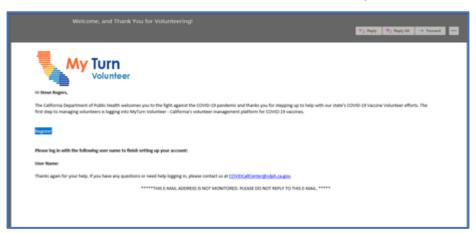
- Streamlined repeat volunteer process
- · Implementation of a health attestation page for potential volunteer
- Implementation of a new process for volunteer to cancel shifts
- Volunteer Directors/Managers can now:
 - bulk verify volunteers
 - create group codes and assign these codes to specific clinics/shifts
 - check in/out volunteers for their shifts
 - ID and publish shift that require foreign language skills

Section 1: Volunteer Management Dashboard

We will start our journey as a Volunteer Director by first understanding the preparation needed to set up a clinic. This section will cover the Welcome Email and My Turn Volunteer dashboard, Let's get started!

🚹 The Welcome Email

As a Volunteer Director, you will receive a welcome email including a link to the My Turn Volunteer website. First, click on the link and complete the online registration form.



Homepage and Main Dashboard

Once you have access to the <u>homepage</u>, you will have the ability to manage shifts, manage volunteers, and request Volunteer Managers.



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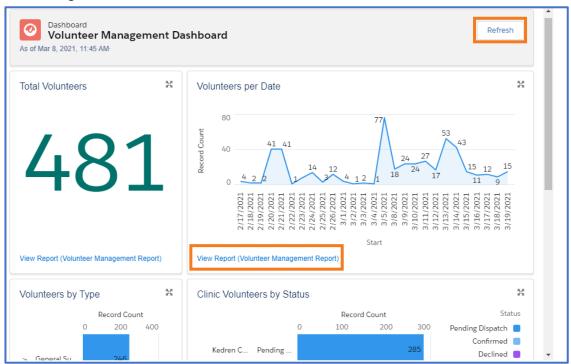
Volunteer Director Job Aid



Homepage and Main Dashboard (continued)

The Volunteer Management Dashboard is an interactive way to view data from multiple reports. When you click refresh, it can be updated in real time. The Volunteer Management Dashboard consists of five sections:

- <u>Total Volunteers</u> number of all volunteer resources who have registered for a shift at clinic event. Note: this is not unique, as it includes those who have registered for multiple shifts
- Volunteers per Date line graph showing the number of volunteer resources who will be working a shift on a particular day. Note: volunteers reflected here are not all vetted/trained
- Volunteers by Type bar graph showcasing the number of Medical Volunteers vs General Support Volunteers
- Volunteers by Status (not shown) bar graph showcasing how many volunteer resources are in each status: Pending Dispatch, Confirmed, Declined, Deleted
- <u>Clinic Volunteers by Status</u> incorporates the Volunteers by Status by listing every active clinic and detailing the status for each of their volunteers



In each of the five sections, you can click View Report at the bottom that will navigate you to see the full report.

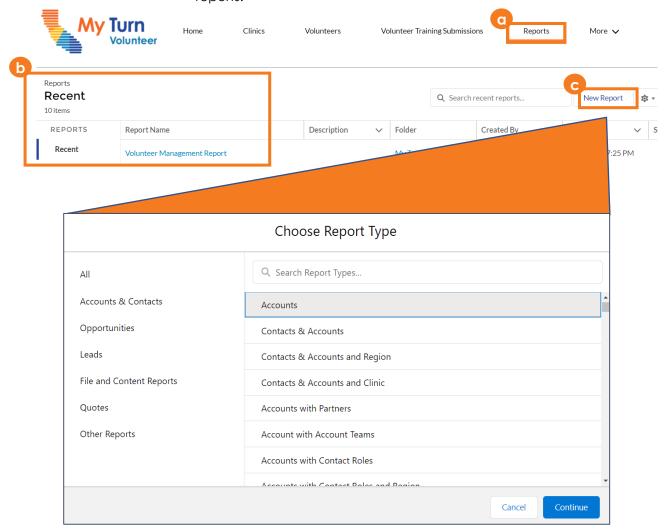
Volunteer Director Job Aid



Reporting

The Reports tab offers options to create reports and spreadsheets with the information you need for your clinic. Here, you can select what data you'd like in the report. You can also save reports templates so that you can access them easily in the future.

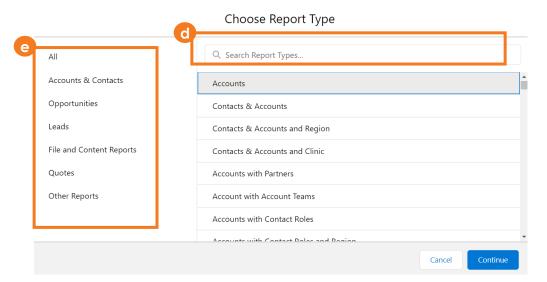
- a. Click on the"Reports" tab at theMy Turn VolunteerHome Page.
- b. You can see your previously saved reports here. You can either view Recent Reports or "All" reports.
- c. Select "New Report". This will create a pop up with Report Type information.







Reporting (continued)



d. If you know the type of report you would like to run, you can type the category into the search bar.

You will be able to add additional information, such as the clinic, but you must select the focus of your report.

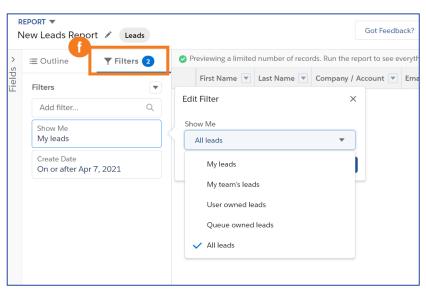
- e. There are five sub-categories on the left hand side. These sub categories can help you find what you're looking for without knowing the exact name. If you'd like to browse report types, you can select one of the following and options will enter the drop down so that you can select what you need:
- All All categories
- <u>Accounts & Contacts</u> Reports focused on accounts (clinic and Provider info), contacts (volunteers), or accounts and contacts.
- Opportunities These reports are not applicable for My Turn Volunteer.
- <u>Leads</u> Leads capture the volunteers that come to the community landing page, submit an
 interest form, but do not register for a shift. It also captures volunteers that complete a training
 form, but submit information that does not match a resource object.
- <u>File and Content Reports</u> These reports are not applicable for My Turn Volunteer.
- Quotes These reports are not applicable for My Turn Volunteer.
- Other Reports All reports not categorized in the other sub categories.



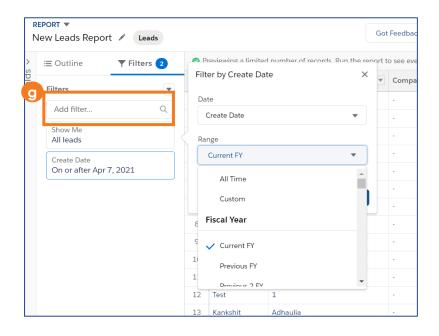


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Reporting (continued)



f. Once you've selected your report type, go to the filters tab and select "All Leads" (or all of the category you selected that your clinic has permission to see). If you do not select "all" then you will only see a partial view. If you would like a partial view, you have the option to select what you'd like to view such as filtering by first name.

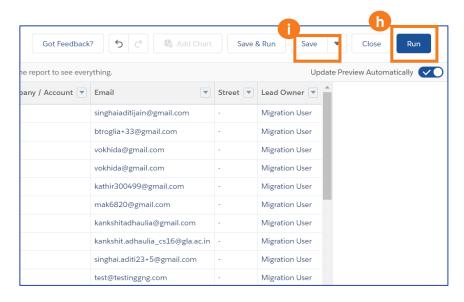


g. Next, select the filters you would like to see. Here, you can narrow down your search. For example, you can filter by edit date or who created the entry. In this example, we have selected Create Date. Within this, you can see different options by which to filter.



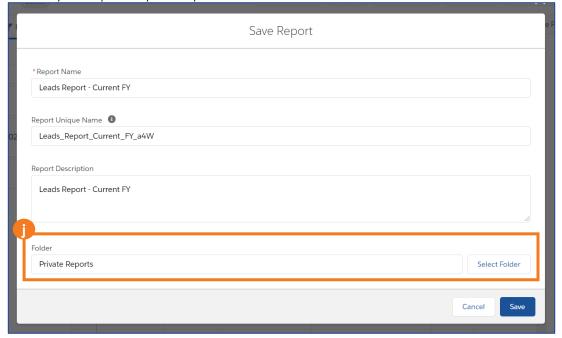


Reporting (continued)



- h. Next, click "Run". This will run the report and show a preview within the site. However, running the report will not save it. If you would like to save the report, you will need to "Save and Run.
- i. Save and Run will allow this report to be saved.

j. Clicking "Run and Save" will create a pop up that asks you what you would like to name the report. You should save it in your Private Report folder or else you will have to recreate this report. When you're ready, click "Save". You will now be able to see your report in your Reports dashboard.

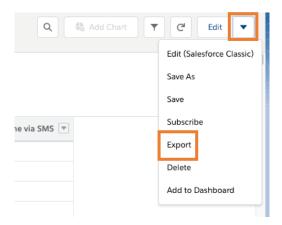






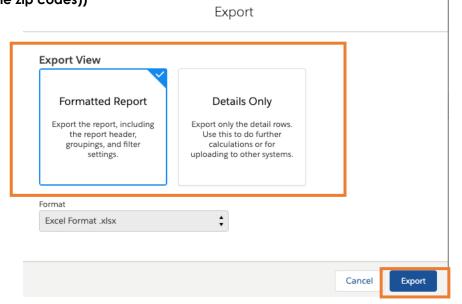
Export Report

Click on drop down arrow next to edit button. Select 'Export'



Select the type of export view desired and click "Export". Excel doc will download.

(<u>Note</u>: Exporting full report may provide a broader scope of flexibility to sort/filter (ex. Filter report by multiple zip codes))





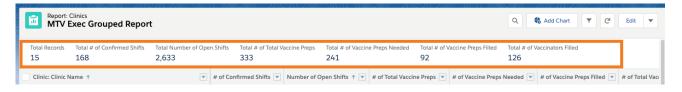


My Turn Volunteer Exec Grouped Report

This report shows high level shift stats (Volunteers needed, filled, etc.) per clinic. Helps assess what roles still need to be filled.

Key Performance Indicators (KPIs)

- Total Records number of clinics
- Total # of Confirmed Shifts the Sum of all confirmed shifts in all shift timings for this clinic
- Total Number of Open Shifts remaining shifts to be filled at the clinic
- Total # off Vaccine Preps Needed total resources needed for this specific volunteer role
- Total # of Vaccine Preps Filled total volunteers assigned for this role
- Total Number of Vaccinators Filled total resources needed for this specific volunteer role



Report Link: Click Here

Volunteer Director Contact Info Report

This report shows Volunteer Director contact information per clinic.

Key Performance Indicators (KPIs)

<u>Total Records</u> - number of clinics







Volunteer Director - Daily Volunteer Shift

This report shows Volunteer contact information along with additional volunteer descriptors.

Key Performance Indicators (KPIs)

• Total Records - number of allocated shifts

Key Fields

Category – type of volunteer (medical or general support)

Passed Background Check? – Y/N field if volunteer has passed background check

Completed Volunteer Training? - Y/N field if volunteer has completed training

Status – Volunteer status on whether they have been verified or not

<u>Time Checked In –</u> manual input field (person checking in person, will write down time volunteer checked in).

<u>Time Completed</u> - manual input field (person checking out person, will write down time volunteer completed shift).



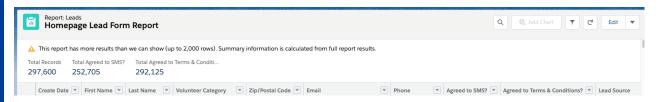
Report Link: Click Here

Homepage Lead Form Report

This report shows total number of leads and their contact information.

Key Performance Indicators (KPIs)

- Total Records number of leads
- Total Agreed to SMS? number of leads who agree to be contacted via SMS
- <u>Total agreed to Terms & Conditions</u> number of leads who agree to terms and conditions





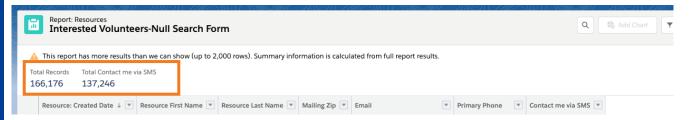


Interested Volunteers – Null Search Form

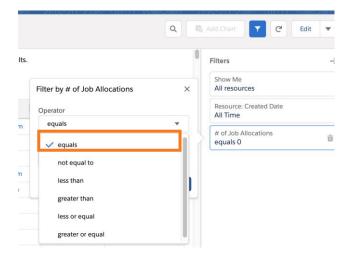
This report shows total number of volunteers who are interested in volunteering and have not signed up for a shift (unaffiliated volunteers).

Key Performance Indicators (KPIs)

- Total Records number of unaffiliated volunteers
- Total Contact me via SMS number of unaffiliated volunteers who agree to be contacted via SMS



To show all volunteers who have signed up for a shift, you must select the filter "# of Job Allocations" Then set the Operator to "does not equal 0" and click "Apply"





Verified Volunteers for Past Jobs Report

This report shows total number of verified volunteers who have successfully completed previous jobs.

Key Performance Indicators (KPIs)

Total Records – number of allocated shifts

Key Fields

<u>Job</u> # – Auto-numbered field from Skedulo for grouping of volunteer shifts <u>Job Allocation #</u> – Overview of comprehensive details associated to Job #

Clinic Name - Name of Clinic

Clinic Address - Address of Clinic

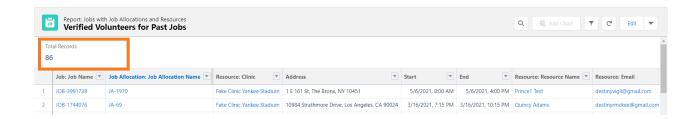
Volunteer Name – Name Associated of Volunteer in Volunteer Record

Volunteer Email – Email address associated in Volunteer Record

<u>Volunteer Status</u> – Volunteer status on whether they have been verified or not

<u>Time Checked In</u> – Manual input field (once the volunteer has been checked in, the system will add the time the volunteer was scheduled to show up to the database)

<u>Time Completed</u> – Manual input field (once the volunteer has been checked out, the system will add the time the volunteer was scheduled to end their shift to the database)





Section 2: Clinic Management

Now that we have seen how to view the home dashboard, let's now understand the role a Volunteer Director plays in the management of clinics. In the next few steps, we will cover how to create new volunteer shifts, viewing clinic details, as well as run reports and dashboards for clinics.



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<u>Next</u>



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Volunteer Resource Management

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Preparation The Week Of The Clinic

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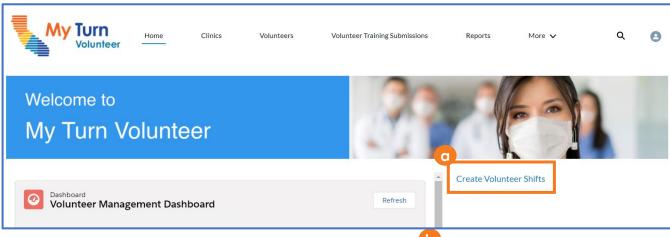
Volunteer Director Job Aid



Creating New Volunteer Shifts

Let's first see how to navigate and create volunteer shifts for an existing Clinic.

a. Start by clicking on the "Create Volunteer Shifts" on the Homepage. This will take you to the Skedulo Web App – a part of the My Turn website that helps with scheduling clinics.

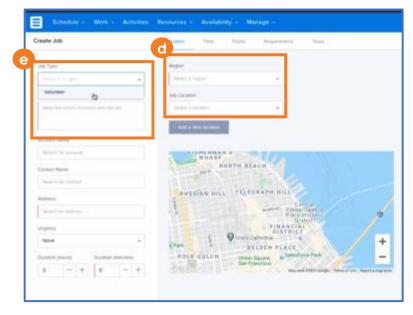


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Skedulo Web App

- b. From the top of the page click on the " + " button.
- c. Then select "Job" from the drop-down menu
- d. You will want to fill out the Region and Job Location first as details for address will autopopulate. The Job Location will be the clinic name or area the clinic is in. This data will be populated base off the clinics created in My Turn Clinic.
- b. You will then select the Job
 Type of "Volunteer." The
 Description may auto-populate
 after you select the Job Type
 but can alter as needed. This
 will show externally to volunteers
 when registering.



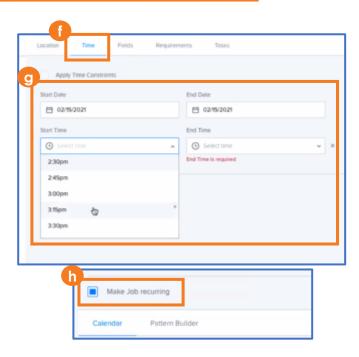






Creating New Volunteer Shifts (continued)

- f. Next, select the "Time" tab from the top.
- g. Inside of the Time tab you will select the date range for the shift as well as the start and end times.
- h. Optionally, If you select the "Make Job Recurring" button, you have the option to select the calendar dates for when the shift will be repeated.



For the next step, you will need to understand the existing Tags in the system and what they mean. Below is a list of the Tags or Volunteer Roles that you will use when creating Requirements and Volunteer types needed for your clinic.

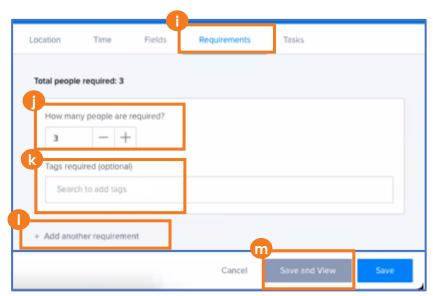
Volunteer Roles	Volunteer Type	Role Description
Patient Observer	Medical Volunteer	Watch over patients during clinic and after Vaccine has been administered. Takes notes and work closely with Medical staff to document any aftereffects a patient may have after vaccinated.
Vaccinator	Medical Volunteer	Administer the vaccine to patients.
Vaccine Prep	Medical Volunteer	Aid in preparation of Vaccines. May also include appropriate data entry related to vaccines.
Greeter	General Support Volunteer	Help greet, manage the directing and flow of patients, monitor the line, and answer logistical questions from patients.
Registration	General Support Volunteer	Assists in checking in patients and confirming their identity and necessary documentation to align with their vaccine appointment. May also include clerical support and data entry.
Volunteer Management	General Support Volunteer	Assists in the registration, support, and management of volunteers on the clinic day.

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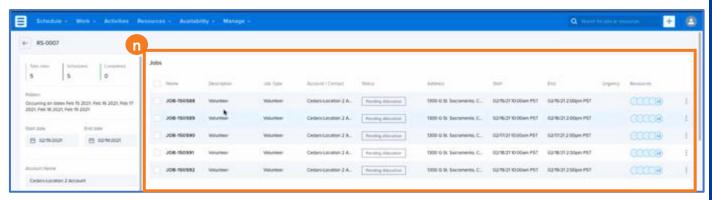
Volunteer Director Job Aid

Creating New Volunteer Shifts (continued)

- i. From the top tab, select the "Requirements" section.
- j. You will then want to add the number of volunteers that are needed for a certain volunteer type.
- k. The "Tags Required" section is where you will pick the volunteer type (e.g., Vaccine Prep, Greeter) needed for that requirement. You can also add a **language tag** if the volunteer needs to speak another language.
- From there, create a new requirement for each volunteer type you need.
- m. Once you have completed all fields, click Save and View at the bottom right.

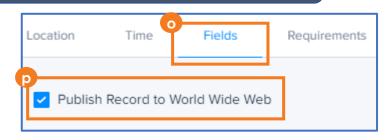


n. You will then be able to see all details of the Job that you have just created. Note: these shifts are not posted to the world until you publish the record to the web (see P).



Note: Any details of the Job, such as volunteer types or number of volunteers needed, can be edited by clicking on the job name.

- o. When you are ready for volunteer to sign up, navigated to the fields tab.
- p. Check the Publish Record to World Wide Web and save. Now Volunteers can sign up for your clinic!





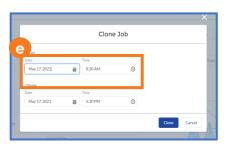
Cloning Existing Volunteer Shifts

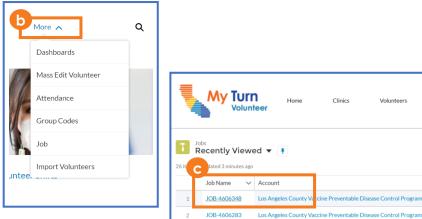
Let's now see how to clone an existing job. Cloning a job allows you to copy the resources and details of that job while giving you the option to change the date and time for easier scheduling.

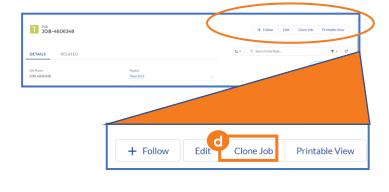
a. Start by clicking on **more** from the **homepage**.



- b. Click job from the dropdown menu.
- c. Select the job you want to clone. It will open the page with job details.
- d. Click "clone job" on the details page.
- e. A pop-up window will allow you to change the date and time. Click clone to save. "Success Record Created Successfully" message will appear.







JOB-3458415

Clinics

Los Angeles County Vaccine Preventable Disease Control Progr

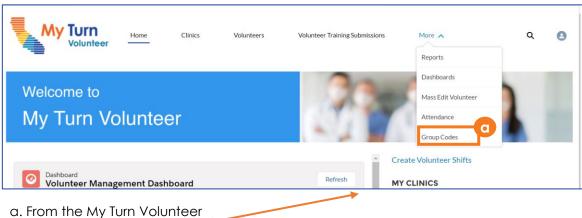
Volunteers

cine Preventable Disease Control Program

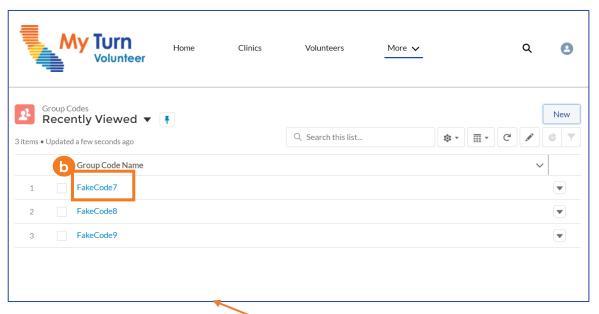
Volunteer Director Job Aid

Group Codes

If you want specific people to be volunteers for your clinic, you can make a 10-digit Group Code that they can use. Clinic shifts that utilize a group code can only be seen by those with the code. You can use the same code for more than one clinic shift if you would like.



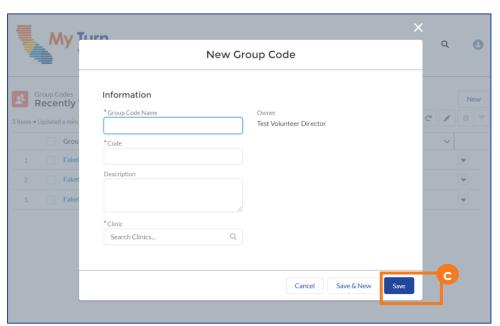
a. From the My Turn Volunteer home page, click "More" and select "Group Codes"



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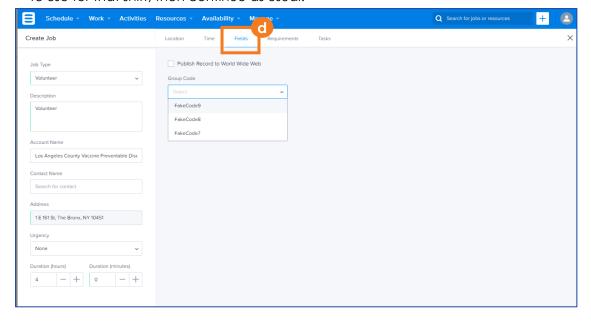
b. You will be taken to the My Turn group code page. If you have already created group codes, they will be listed here.

Group Codes (continued)



c. After you click 'New' you will see the new group code pop up. Enter the group code name and a 10 character alphanumeric code. For security purposes, the code must be 10 characters in length or longer.

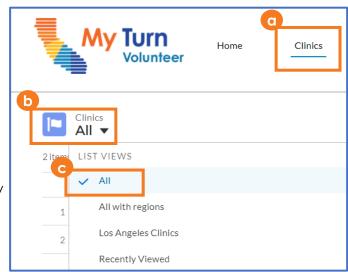
d. The group code will now show up in Skedulo. When you create a new job, in the 'Fields' tab you will see a drop down for group codes. Select the code you want to use for that shift, then continue as usual.

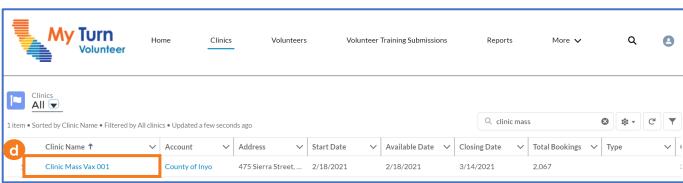


Viewing Clinic Details

Now that you know how to create shifts for a clinic, let's now understand how to review existing clinic details.

- a. At the top of the page select the "Clinics" tab.
- b. Click on the "Clinics" section at the top of the page to bring down the list view menu.
- c. Select the "All" view to see a list of all clinics, active or not.
- d. Click on the hyperlinked Clinic Name to view more details on the clinic.
- e. After clicking on the clinic name, the results will show all details about the clinic.







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Volunteer Director Job Aid

Viewing Clinic Details (continued)

As you continue to scroll further down into the clinic's details, there are three sections: Volunteer Shift Information, Medical Volunteer Information, and General Support Information.

Volunteer Shift Information provides you easy access to data concerning the status of volunteer shifts for this specific clinic.

# of In Progress Volunteers	g # of Complete Volunteers
0	0
# of Confirmed Shifts	Number of Open Shifts
163	34
# of Tentatively Filled Shifts	k # of Volunteers who did not Check-
19	163

- f. # of In Progress Volunteers total number of volunteers with their **status** as **In Progress**
- g. # of Complete Volunteers total number of volunteers with the value of Complete in the status field of their related Job Allocation
- h. # of Confirmed Shifts all confirmed shifts corresponding to the timing(s) for this clinic
- i. <u>Number of Open Shifts</u> remaining shifts to be filled at the clinic
- j. # of Tentatively Filled Shifts all tentatively filled shifts in all shift timings for this clinic
- k. # of Volunteers who did not Check-In all volunteers with the value of Confirmed in the status field of their related Job Allocation but did not check-in the day of their clinic (no shows/did not check-in)
- # of Volunteer Cancellations the sum of all Volunteers with the value of **Declined** or **Deleted** in the status field of their related **Job Allocation**

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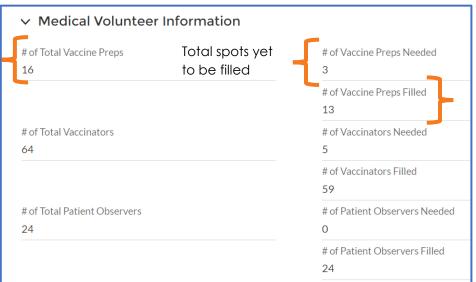
Volunteer Director Job Aid

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Viewing Clinic Details (continued)

In the clinic's details, you will find the Medical Volunteer and General Support Volunteer Information. On the left side of each section, it shows the total number of resources needed for each role. On the right, it breaks down how many resources have signed up versus how many are still needed. As new volunteers register or cancel their shifts, these numbers update in real time.

Total Resources needed for this specific Volunteer



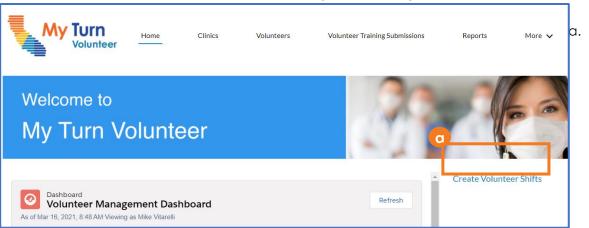
Total volunteers assigned

∨ General Support Volunteer Information		
# of Total Greeter Volunteers 182	# of Greeter Volunteers Needed 96	
	# of Greeter Volunteers Filled 86	
# of Total Registration Volunteers 182	# of Registration Volunteers Needed O	
	# of Registration Volunteers Filled 182	
# of Total Vol. Management Volunteers 86	# of Vol. Management Volunteers Needed O	
	# of Vol. Management Volunteers Filled 86	

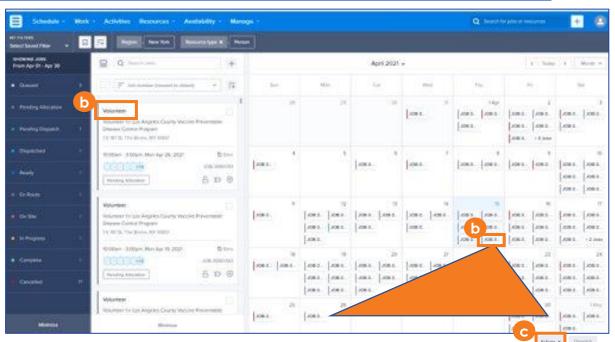
Volunteer Director Job Aid

Canceling a Shift

If your clinic no longer wants to host a shift, you can cancel the shift in Skedulo. Please note, this should only be used if a shift was created that SHOULD NOT exist. Canceling a shift sends a notification to volunteers that this shift is no longer happening.



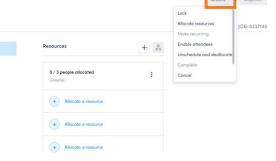
From the My Turn home page, click "Create Volunteer Shifts" to get to Skedulo.



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b. Next, select the shift you would like to cancel from the calendar or select it from the left-hand list.

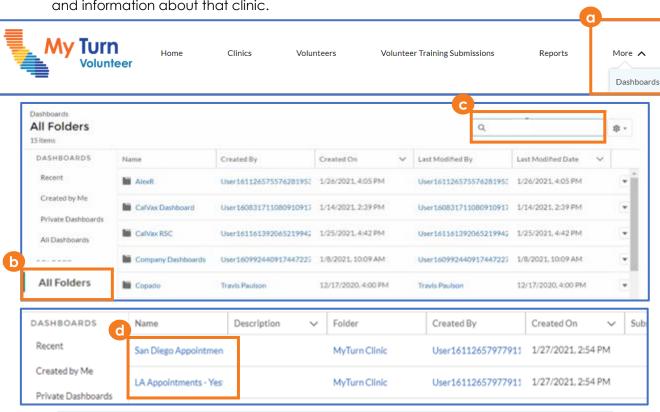
c. Click "Actions" from job detail page and select "Cancel".



Clinic Dashboards

Let's now see how to view the Clinic Dashboards.

- a. From the top of the page, click on the "More" section to reveal the Dashboard section, and click on "Dashboards."
- b. Click on the "All Folders" section on the left of the screen
- c. In the search bar type in "my turn clinic"
- d. This will then show you available clinic dashboards named for their location.
- e. Clicking any of the dashboards will show you that clinic's dashboard showcasing details and information about that clinic.



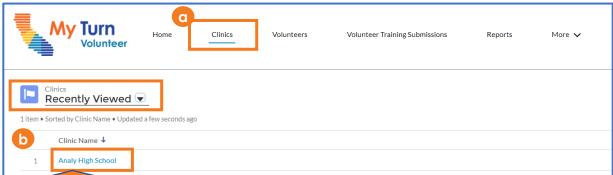


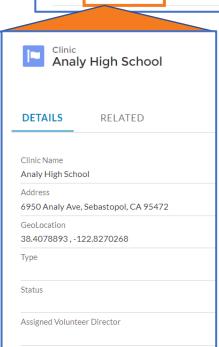
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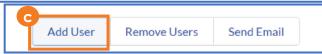
Assigning Volunteer Managers

You can add the <u>same</u> volunteer manager to <u>multiple clinics</u> or assign them to a single clinic.

- a. At the top of the page, select the Clinics Tab
- b. You will be brought into your most recently viewed Clinics. Click the drop-down arrow to select a list view and click on the clinic you wish to assign a Volunteer Director







- c. Once you are brought into the Clinic details, you will see three buttons: Add User, Remove Users, and Send Email. Click "Add User"
- d. A pop window will appear: Check "volunteer manager"
- e. Then you have two options:
- search for an <u>existing volunteer manager (must be assigned at another clinic as a Volunteer Manager)</u> by typing their name in "search user" field

OR

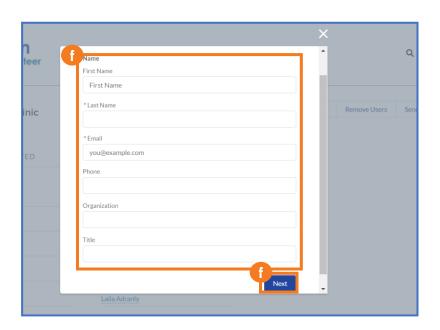
· Click "Add New User"

26



7

Assigning Volunteer Managers (continued)

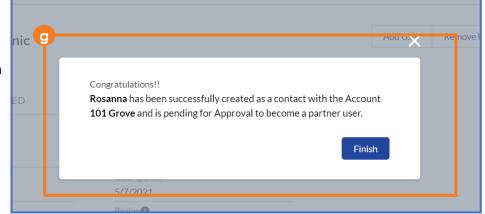


- f. Fill in
 - First Name
 - Last Name
 - Email
 - Phone Number
 - Organization
 - Title

Then click NEXT.

g. A message will appear stating " (volunteer manager name) has been successfully created as a contact with the account (clinic name) and is pending for Approval to become a partner user."

Click Finish and you will go back to the clinic details.

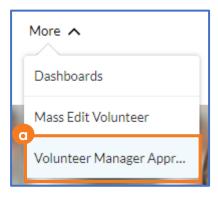


8

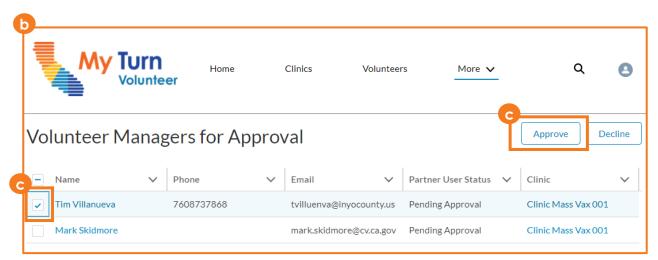
Approving Volunteer Managers

Volunteer Managers must first be approved by either the Volunteer Director or their designated State Volunteer Officer before gaining access to My Turn Volunteer. Volunteer Managers are initially created within a clinic's details, just like Volunteer Directors. Here is how to approve Volunteer Managers:

a. Under the "More" tab in the top navigation bar, click Volunteer Manager Approvals.



- b. Here all State Volunteer Officers have visibility to all pending Volunteer Managers.
- c. In order to approve a Volunteer Manager, click the checkbox to the left of their name and click the "Approve" button. If you want to approve multiple Volunteer Managers, you can select multiple checkboxes or click the checkbox next to "Name" which selects all.

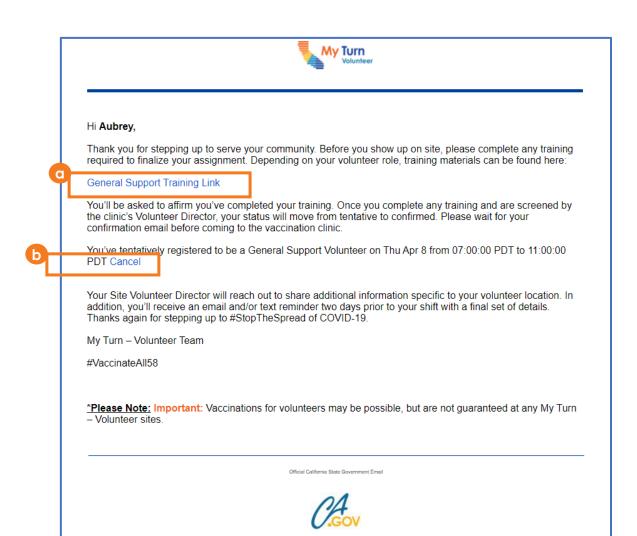


Volunteer Director Job Aid



Volunteer Experience Overview - Volunteer Email

This is the email that the Volunteers will get. It includes links to the training previously mentioned. From here, volunteers can get their training done. If a volunteer is no longer able to come to their shift, they can cancel their shift from this email as well.



30

a. General Support training link – this takes the volunteer to safety information as recommended by the CDC.

b. Cancellation link – if a volunteer would like to cancel their shift, they can click this link and their shift will be automatically canceled.

Volunteer Director Job Aid



Volunteer Experience Overview – Health Attestation

Before their shift, the volunteers will be sent an automatic email that includes a Health Attestation form. This form must be completed 24 hours before their shift.



Hi Aubrey,

Are you ready to be a General Support Volunteer at 1 E 161 St, The Bronx, NY 10451 from Thu Apr 8 07:00:00 PDT 2021 to Thu Apr 8 11:00:00 PDT 2021? Yes! We'll see you tomorrow.

Please remember to:

- · Arrive 15 minutes before your shift starts to allow time for parking.
- · Bring a government-issued ID for check-in.
- a
- Bring a mask to wear throughout your shift.
- Please complete the Health Attestation 24 hours before your shift.

See you soon! Test Volunteer Director kat300499@gmail.com

P.S. If you are no longer able to serve tomorrow, please reach out to kat300499@gmail.com or cancel.your shift as soon as possible.

Official California State Government Email



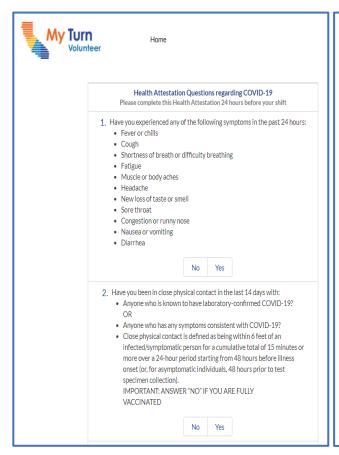
31

a. Health Attestation Link – this link will take the volunteer to the Health Attestation form. This must be filled out 24 hours before their shift. The Health Attestation form is on the next page; it asks questions about the health of the volunteer.

Volunteer Experience Overview – Health Attestation Form

When a Volunteer clicks the Health Attestation link, they will be brought to this form. There are questions as recommended by the CDC to make sure that volunteers are in good health. The volunteer will then sign their personal information so that we can track that they have completed the health attestation.

32



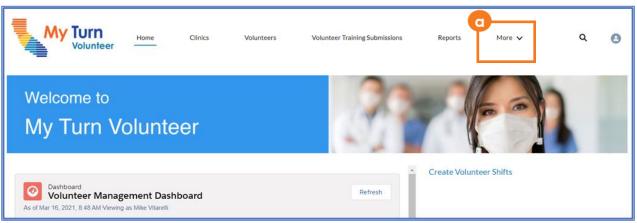
	No Yes
4. Are you currently	waiting on the results of a COVID-19 test?
IMPORTANT: AN	SWER "NO" IF YOU ARE WAITING ON THE RESULTS
OF A PRE-TRAVE	L COVID-19 TEST.
	No Yes
5. Have you travele	d in the past 10 days?
public transporta	as any trip that is overnight AND on stion (plane, train, bus, Uber, Lyft, cab, etc.) OR any trip AND with people who are not in your household.
triat is overriight.	No Yes
D	
Personal Informat *First Name	ion
*First Name	ion
*First Name *Last Name	ion
	ion
*First Name *Last Name *Email	ion

2

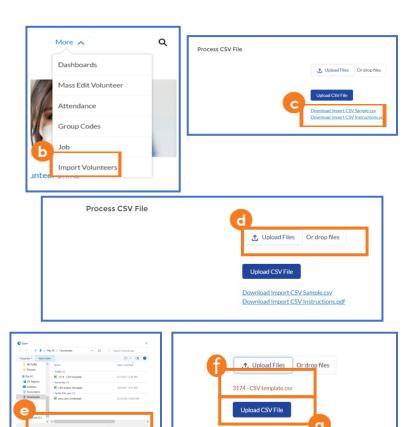
Import Volunteer Data Through CSV Files

You can now import volunteer data using a CSV file with specific data so that it can be entered into My Turn Volunteer, making it easier and faster for your volunteers to register.

a. Click more on the top.



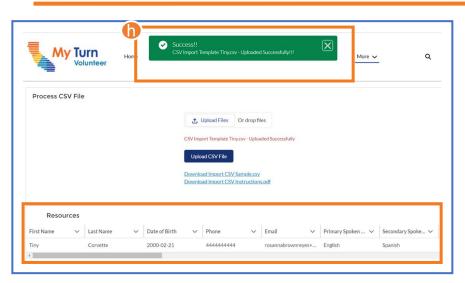
- b. Click on import volunteers from drop down menu.
- c. You can click on "Download Import CSV sample" link to see a template with exact requirements for the CSV file. Click "Download Import CSV Instructions" link for further instructions.
- d. On the process CSV file, click upload CSV file or drop file.
- e. If you upload a CSV file instead of dropping the file in, select the file from your file manager.
- f. You will see your file in red below upload files.
- g. Click "upload CSV file" to upload to My Turn Volunteer.



Download Import CSV Sample

Download Import CSV Instructions.pdf

2 Import Volunteer Data Through CSV Files (contd)



h. If the file was uploaded into My Turn Volunteer successfully, you will see a "Success!! File name.csv-Uploaded Successfully!!!" message in green **and** the input under resources.

i. If the file was <u>not</u> uploaded successfully, you will see an error message "Error!! (filename). csv upload failed due to error. Please click on "Click here for errors" to download error files."



J. Click on "Click here for

download the error csv file. Scroll all the way to the right to find the exact error.

errors" to open and/or

34

Primary Spoken Language is required.

section of the Volunteer

k. You can view the resource upload in the recently view



tab.



Reviewing Volunteers

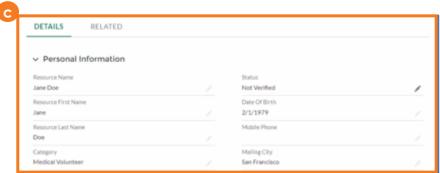
As a Volunteer Director, you can review tentative volunteer registrations. The details on the volunteer profiles will be used to verify volunteers and change their status in the system to show; Verified, Not Verified, or Verification Failed. Let's see how this is done on the site and what each status does!

- a. At the top of the page select the "Volunteers" tab.
- b. You will now be able to see a list of potential volunteers.Click on the name of a volunteer to see more details.





c. Inside the details of the volunteer, you will be able to view their personal information and make edits by clicking the pencil icon next to any item.



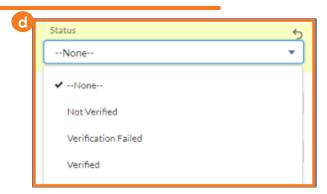
It is important to note that the medical license should be pre-populated from the volunteer's entry. However, the Volunteer Director may manually input the Medical License if needed by clicking the pencil icon and editing the field. The "Completed Volunteer Training?" and "Passed Background Check?" check boxes are auto filled based on the volunteer passing their background check or completing their training, respectively.

The Volunteer Director is ultimately responsible for checking the volunteer details and determining the Status based on these requirements.

Medical License #	Completed Volunteer Training?
Medical License in Good Standing?	Passed Background Check?
Unknown	→
I have received my first vaccination	
I have received my second vaccination	

Reviewing Volunteers (continued)

d. The Status section will be used to determine if a candidate is verified, not verified, or verification failed. The status is determined by the Volunteer Director based on the details of the volunteer. Refer to table below to see what each status means for volunteers.



	Medical Volunteer	General Support Volunteer
Verified	Medical License Check Passed Training Completed	Background Check Passed Training Completed
Not Verified	Awaiting Volunteer Details (Medical License, Training, Background check)	Awaiting Volunteer Details (Training, Background check)
Verification Failed	Did not receive details Auto Shift Cancellation Email sent to volunteer	Did not receive details Auto Shift Cancellation Email sent to volunteer

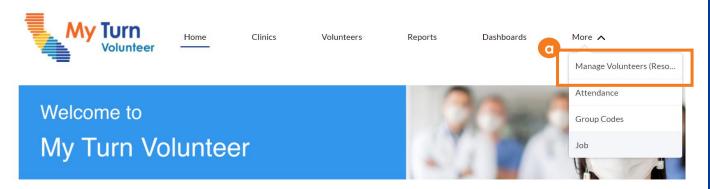


Note: An automatic reminder to complete the required Volunteer Training will be sent to tentative volunteers' emails 72 hours before their shift. No action is required.

Mass Edit Volunteers

Making updates to volunteers individually can be tasking. Thankfully, there is an easier way to make changes to multiple to volunteers using the Mass Edit Volunteer tab. Here's how:

a. First, navigate to the Mass Edit Volunteer tab by opening the drop-down list in the More tab.



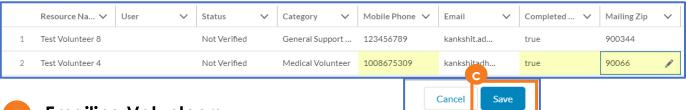


Mass Edit Volunteers (continued)

b. Click the pencil icon and the field will allow you to update the field to make the correction.



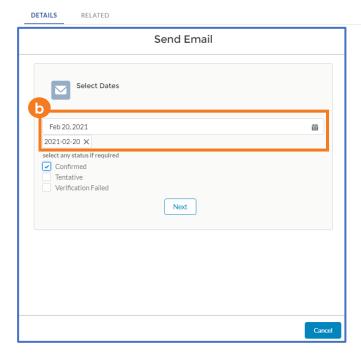
c. You may repeat this process for as many fields as you need. Once you are done, you'll see all the fields you updated highlighted in yellow. Click "Save" at the bottom of the page to ensure these changes are saved to the system.



Emailing Volunteers

Communicating with your volunteers is critical; we want to ensure they are well informed and prepared to serve their shift. When it's time to reach out to the volunteers, navigate to the clinic details and follow these steps:

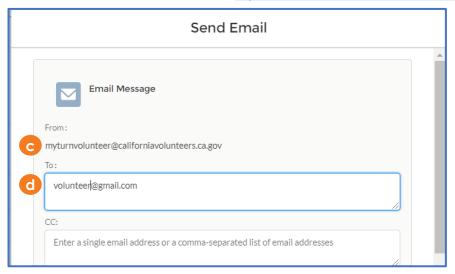




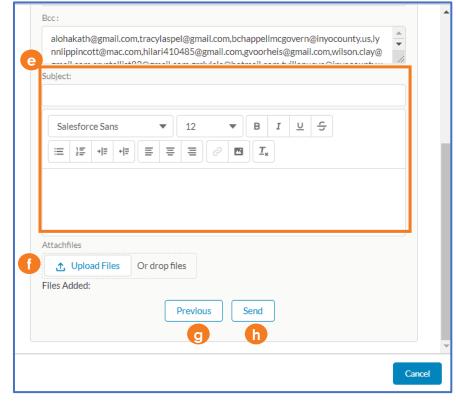
- a. Navigate to the Clinics tab and select the clinic you want to reach out on behalf of, on the right-hand side, there is a drop-down arrow that shows "Send Email." Click "Send Email" and the email widget will appear.
- b. Before you can enter your message, you must first select your audience. This is done by clicking the calendar icon and choosing the date(s) of the shifts you wish to communicate about. You can also choose to segment them by: Confirmed, Tentative, and Verification Failed. Once that is done, click "Next."

Emailing Volunteers (continued)

- c. You are then brought to the next step in the email creation process and will see all the volunteers' emails populated in the BCC section. Additionally, the email associated to your My Turn Volunteer user account in the To section.
- d. By default, all emails will be sent out from myturnvolunteer@californiavolunteers.ca.gov.



- e. Enter a subject you think will capture your audience's attention and enter your content below.
- f. You have the option of attaching multiple PDFs that you wish to share with the volunteers.
- g. If you need to change your audience, you can click "Previous" to return to the calendar selection
- h. Once you have entered all your content, make sure to review for spelling errors and you have uploaded the correct attachments. Then, when you are ready, click "Send.'





Section 4: Preparation the Week of the Clinic

Congratulations! You now have the knowledge to operate as a Volunteer Director in My Turn Volunteer! In the next few steps, we will cover what to do 72 Hours, 48 hours, and 24 hours before the clinic, as well as the responsibilities during the day of the clinic.



Curriculum Overview:



Volunteer Management Dashboard

- Welcome Email
- View Volunteer Management Dashboard
- Reporting



Clinic Management

- Access Skedulo to manage volunteer shifts
- Clone existing shifts/jobs from My Turn Volunteer portal
- Group Codes
- View clinic details
- Clinic Dashboards
- Assigning Volunteer Mangaers
- Approving Volunteer Managers



Volunteer Resource Management

- Volunteer Experience Overview
- Import CSV files with Volunteer data
- Edit and vet Volunteer records
- Visibility to Volunteer Training Submissions
- Mass Update Volunteers
- Send bulk emails to Volunteers

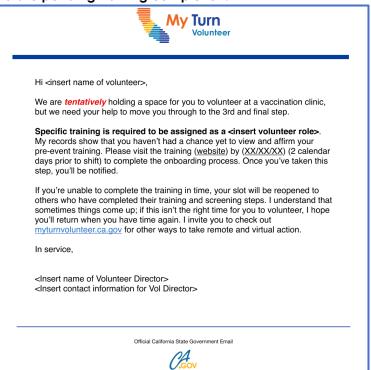
<u>Next</u>

Preparation The Week Of The Clinic

- 72 hours before the clinic
- 48 hours before the clinic
- 24 hours before shift
- Day of the clinic

72 Hours Before the Clinic

At this point, most shifts should have been filled and volunteers should have completed their respective trainings. If they have not, an email is automatically sent out 72 hours prior to the clinic to all volunteers who are pending training completion.

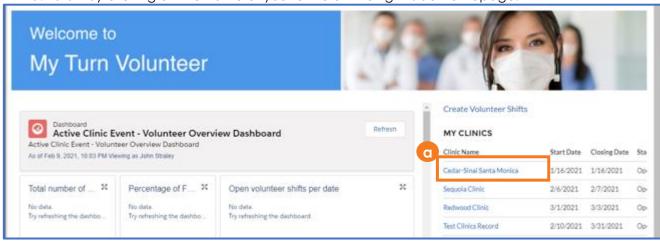


2

48 Hours Before the Clinic

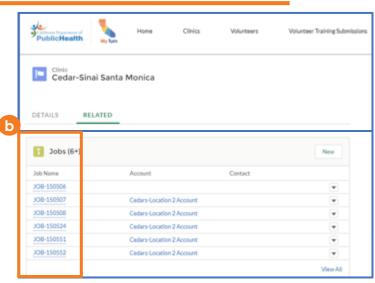
You will continue to review the dashboards and reports to observe how volunteer shifts are filling up for clinics. 48 hours before the Clinic begins, we recommend you cancel all tentative volunteer registrations with pending trainings to make room for new volunteers. Let's see how this is done:

a. Start by clicking on the name of your clinic on the right-side Homepage.

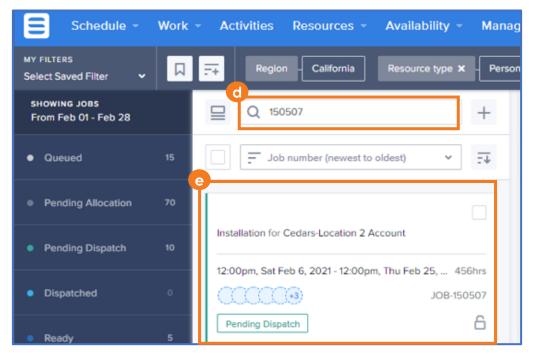


48 Hours Before the Clinic (continued)

- b. On the Clinic details page click on the "Related" tab" to view the Job Name that you will look up.
- c. Click on the "Details" tab and then on the "Click Here" under the Create Volunteer Shifts section to enter Skedulo.
- d. Once on Skedulo, type on the Job Name in the search bar.
- e. When you find the Job Name you are looking for, click on the section for the Job.



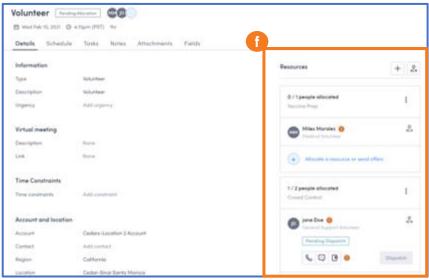




41

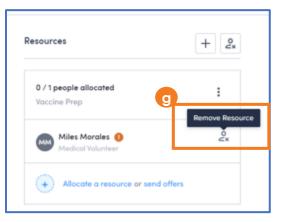


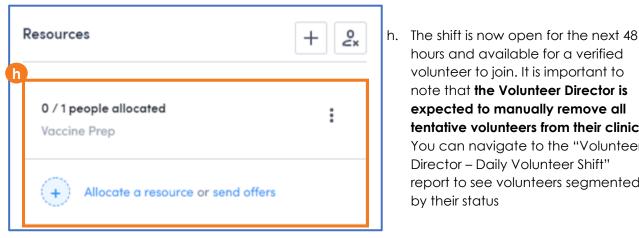
48 Hours Before the Clinic (continued)



You will now be able to see the volunteers that are associated with the clinic and clinic shifts.

a. A volunteer that is not verified 48 hours before their shift is considered "Tentative". Deleting them from the shift will allow there to be an open allocation and potential to bring in a new verified volunteer for that shift. Press the "Remove Resource" button to remove the tentative volunteer but keep the shift open.



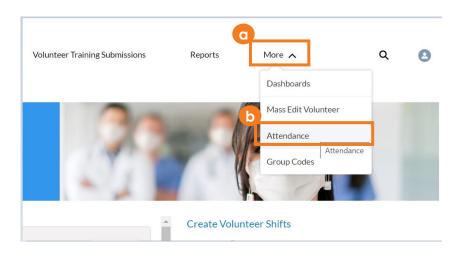


hours and available for a verified volunteer to join. It is important to note that the Volunteer Director is expected to manually remove all tentative volunteers from their clinics. You can navigate to the "Volunteer Director - Daily Volunteer Shift" report to see volunteers segmented by their status



24 Hours Before Shift (Checking In / Checking Out Volunteers)

- a. 24 hours before your shift, click "More" from the My Turn Home page.
- b. Select "Attendance" to check in (or check out) volunteers.



c. Enter the date and time of the shift.

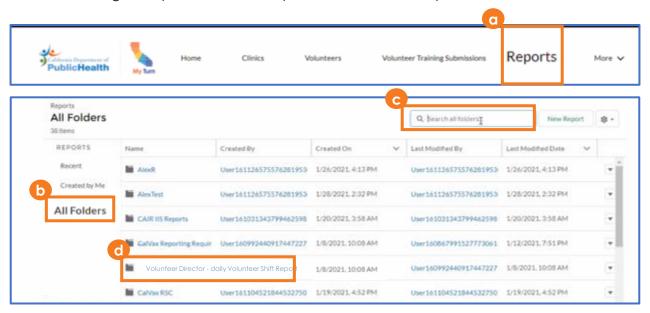


- d. When you're ready to check in or check out a volunteer, click the box to the left to check off all volunteers.
- e. To check the volunteers in, click "Check In" at the top. You will get a notification that this has been completed.
- e. To check the volunteers out, click "Check Out" at the top. You will get a notification that this has been completed.

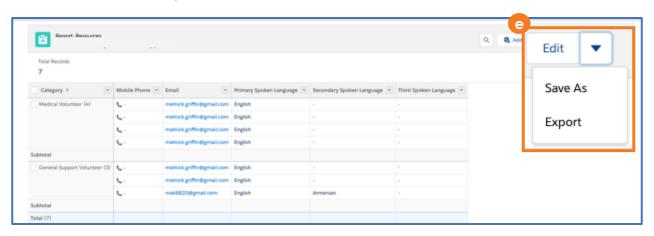
Day of the Clinic

Once a volunteer has met all the criteria and the Volunteer Director has confirmed their scheduled shift, the Volunteer Director will oversee checking in of the volunteers during the day of the clinic. Let's now see how this is done:

- a. From the top of the page, click on the "Reports Tab."
- b. You will then press the "All Folders" tab on the left side of the screen.
- c. In the search bar type in "Volunteer Director daily Volunteer Shift Report"
- a. After finding the report click on the report name to see the report details



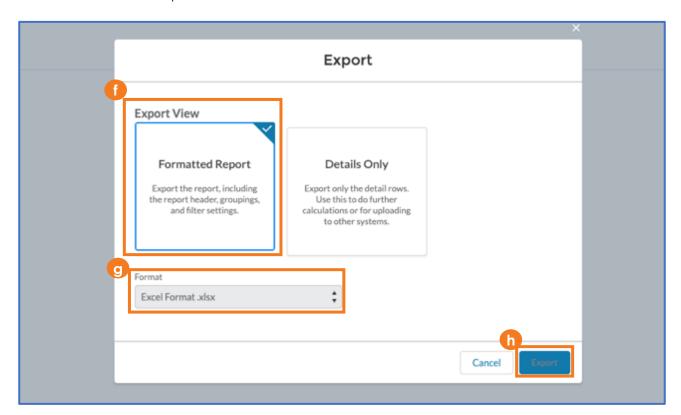
e. Once on the report, click the drop-down arrow next to edit, button at the top of the page and then click the "Export" option



4

Day of the Clinic (continued)

- f. A pop-up window will appear after clicking Export. Select the "Formatted Report" option
- g. Next, ensure that the "Excel Format .xlsx" option is auto selected.
- h. Then click the "Export" button.



You will now have an excel sheet with a roster of expected volunteers that have shifts for that day's clinic. On the excel sheet, you are expected to mark down volunteer check-in information such as start time, end time, break, and no shows.

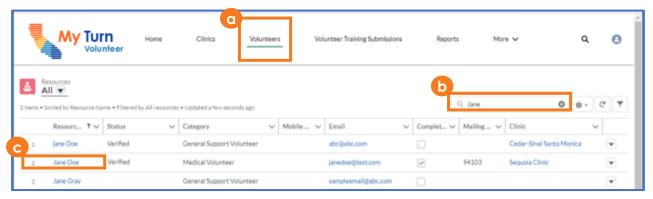
After the clinic has ended, you will need to take the data you had typed in the excel sheet and input it manually on the site. In the next few steps, let's see how this is done!



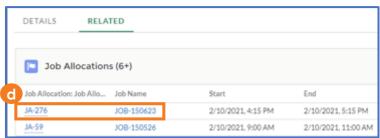
Day of the Clinic (continued)

Let's now see how to manually input volunteer check-in information into the site.

- a. Start by clicking on the "Clinics" section at the top of the homage
- b. You will then search the name of the volunteer in the search bar
- c. Click on the name of the Volunteer.



- d. On the Related tab, click the Job Name associated to the clinic for where the individual will be volunteering.
- e. In the details tab, click on the "Start" section and select the date and time that the Volunteer had showed up for their shift. It is important to note that if a volunteer does not show up, you simply do not fill in a start time. After the clinic has ended, the volunteer's name and details will be sent to a report for tracking.
- f. You would click the "Finish" section to edit and put in the time that the volunteer had ended their shift at the clinic.



DETAILS	RELATED	
Job Name JOB-150551		
Type Volunteer		
Account Cedars-Location	2 Account	
Start		
Finish		
Duration		
60		



Day of the Clinic (continued)

Some additional responsibilities of the Volunteer Director after check-in will include:

- a. Offer a Brief Welcome & On-Site Clinic Debrief
- b. Review Safety & HIPAA protocols
- c. Ensure each volunteer is clear who they can turn to for task assignments and get their questions answered.
- d. Point out to volunteers where bathrooms and other resources are located to make their shift go smoothly.
- e. Make sure to instruct volunteers to check out at the end of their shift and where to do so. As well as check out for their own shifts at the end of their shift.

Day After the Clinic

An automatic thank you email is sent to the volunteers the day after the Clinic. We also want to thank you for your help in stopping the spread of COVID-19 and look forward to having you onboard!



Thank You For Your Support!

My Turn Volunteer

Volunteer Director Job Aid

Appendix - Emails

As you know, communication is key when planning our events to ensure all involved parties know exactly what to do the day of their clinic. Our system has many auto-generated emails at important milestones between registering for a shift and after they volunteer. The purpose of this appendix is to ensure you know what our system is messaging volunteers at specifics times. As a reminder, you can always reach out to your volunteers with more specific content to your clinic utilizing the email feature on page 16 of this job aid.

Volunteer Sign Up Email

Email sent after a potential volunteer has registered for a shift and is pending confirmation.



Hi <volunteer name>,

Thank you for stepping up to serve your community. Before you show up on site, please complete any training required to finalize your assignment. Depending on your volunteer role, training materials can be found here:

Medical Training Link

https://calvax.force.com/VolunteerTraining/s/medical-volunteer-training

General Support Training Link

https://calvax.force.com/VolunteerTraining/s/volunteer-training

You'll be asked to affirm you've completed your training. Once you complete any training and are screened by the clinic's Volunteer Director, your status will move from tentative to confirmed. Please wait for your confirmation email before coming to the vaccination clinic.

You've tentatively registered to be a <insert volunteer role> on <insert day and date of shift> from <start and end time of shift>.

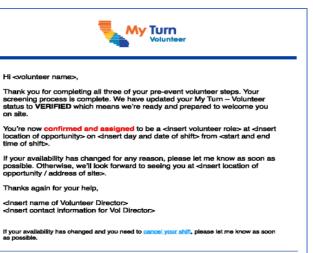
Your Site Volunteer Director will reach out to share additional information specific to your volunteer location. In addition, you'll receive an email and/or text reminder two days prior to your shift with a final set of details. Thanks again for stepping up to #StopTheSpread of COVID-19.

My Turn – Volunteer Team #VaccinateALL58

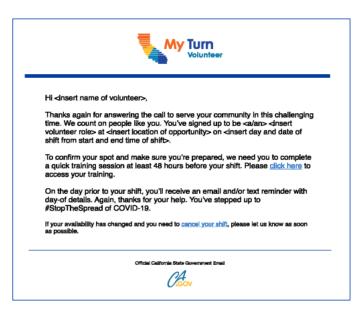
Official California State Government Emai



Confirming Volunteer Registration Email



72 Hours Before Volunteer Shift Email



49

CA

48 Hours Before Shift Email



Thank you for signing up to insert volunteer role at <insert location of opportunity> on <insert day and date of shift> from <start and end time of shift>.

- On your first shift, please:
 Arrive 15 minutes before your shift starts to allow time for parking.
 Bring a government-issued ID for check-in.
 Bring a mask to wear throughout your shift.
 (site-specific requirements may be added here)

Thanks again for stepping up to #StopTheSpread. See you on <insert day(s) of

If you are no longer able to serve, please reach out to me at <insert contact information> immediately.

Thank you.

<Insert name of Volunteer Director>
<Insert contact information for Vol Director>

If your availability has changed and you need to <u>cancel your shift</u>, please let me know as soon as possible.



24 Hours Before Shift Email



Hi <insert name of volunteer>.

Are you ready to be a alsert volunteer role> at <insert location of opportunity> from <start and end time of shift>? Yes! We'll see you tomorrow.

Please remember to:

- Arrive 15 minutes before your shift starts to allow time for parking.
- Bring a government-issued ID for check-in.
 Bring a mask to wear throughout your shift
- (site-specific requirements may be added here)

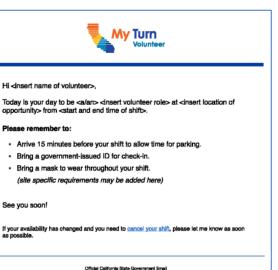
See you soon!
<Insert name of Volunteer Director> <Insert contact information for Vol Director>

P.S. If you are no longer able to serve today, please reach out to <insert volunteer director contact information> immediately.

If your availability has changed and you need to <u>cancel your shift</u>, please let me know as soon as possible.



Day of the Clinic Email



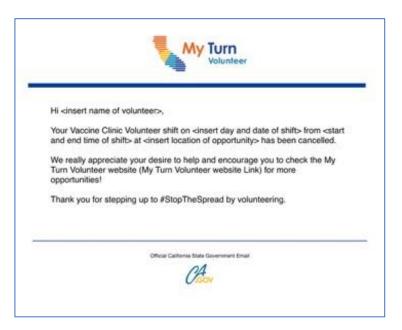
Day After Clinic Thank You Email



51

CACOV

Volunteer Shift is Cancelled Email



Clinic is Cancelled Email

